

New Hampshire

Economic Conditions

January 2009

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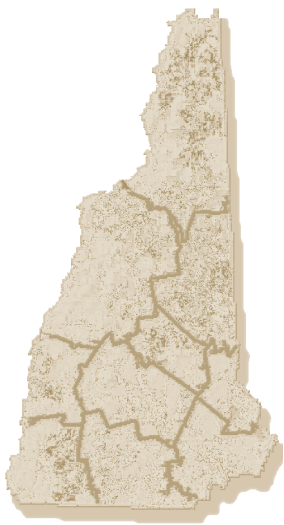
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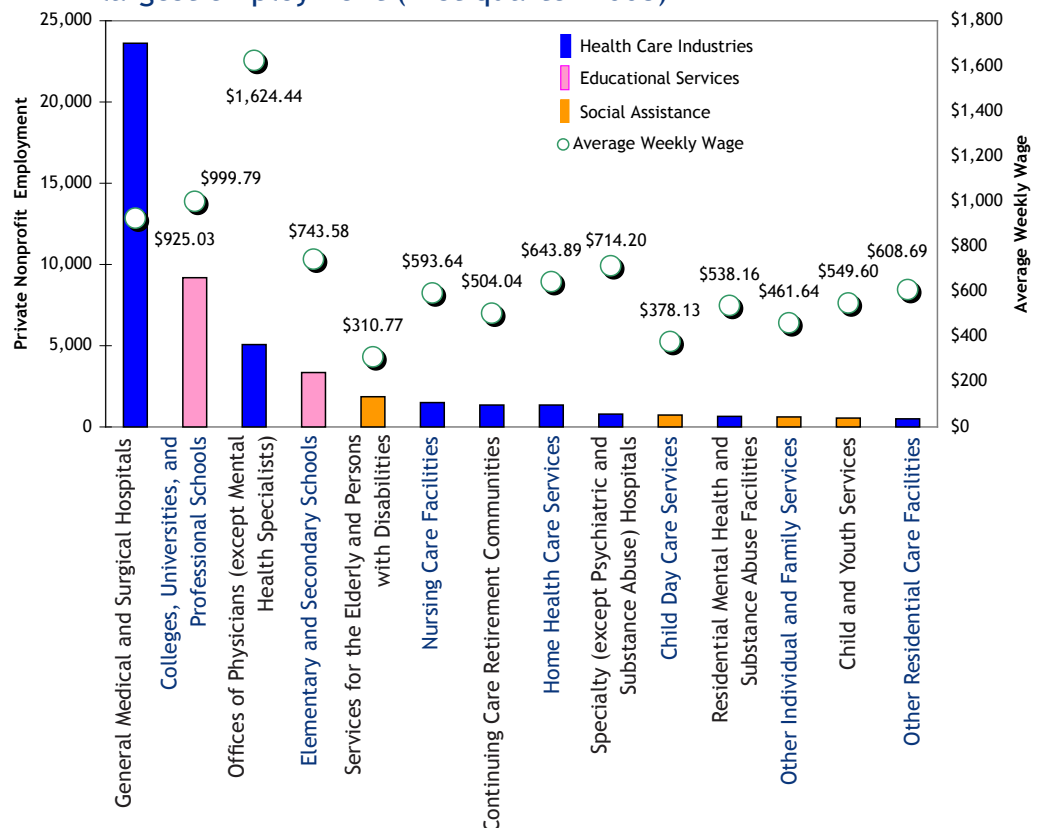
Focus on New Hampshire's Nonprofit Companies from First Quarter 2008

Privately owned nonprofit firms contributed \$666.6 million to New Hampshire's payroll during the first quarter of 2008. These companies employed almost 58,400 workers, eleven percent of the state's private workforce. That was 1,881 more than during first quarter 2007. Seventy percent of nonprofit workers in New Hampshire are employed in *Health care and social assistance* companies.

The average weekly wage of nonprofit workers in New Hampshire during the first quarter 2008 was \$878.13, compared to the statewide average for all private workers (including those at nonprofits) of \$878.07. The average weekly wage of nonprofit workers increased \$46.42 from first quarter 2007, up 5.6 percent over the year.

The majority of nonprofit employees are in *Health care and social assistance industries*. Breaking these firms out to the industry group level provides

Hospital facilities were the leading nonprofit industry with largest employment (first quarter 2008)



Footnote: Employment and wage data for nonprofits above are compared to total employment and wages including nonprofits to maintain confidentiality for the remaining businesses.

a better indication of where the concentration of employment for nonprofits in the state can be found. It also allowed comparison of other nonprofit industry groups with large shares of employment.

Among the nonprofits with the largest employment, there was no distinct pattern of which — or even if — workers were better paid if the business was a nonprofit. The highest average weekly wage during first quarter 2008 was \$1,624.44 for nonprofit *Offices of physicians (except mental health specialists)*, which was higher than for all *Offices of physicians* in the state, averaging \$1,485.09. This was the third largest employing nonprofit industry group, having more than 5,000 workers. Nonprofits made up less than half of the statewide employment for this industry group. That may help explain the large variance in pay between those employed by nonprofits and the average for all private workers of the industry in the state (nonprofits are included as part of the state average).

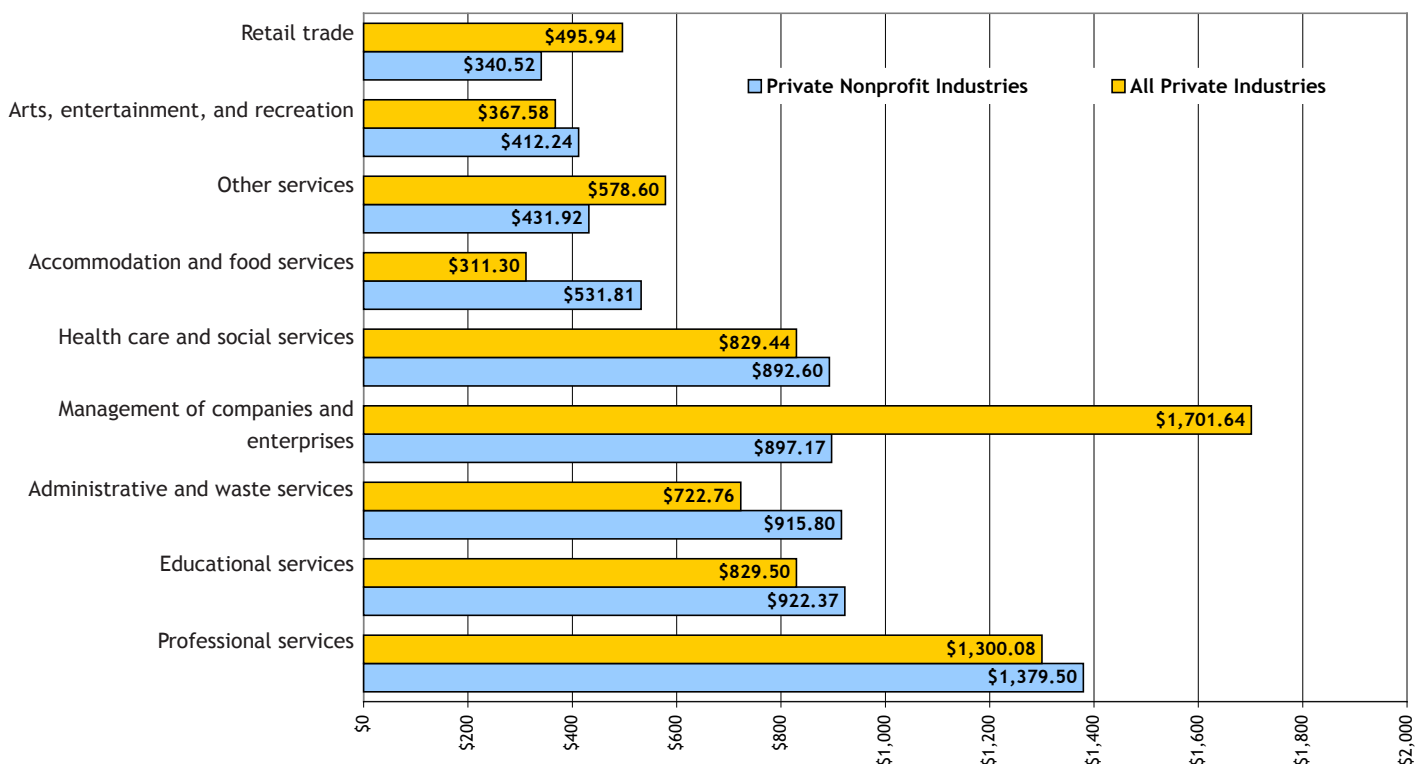
The second highest average weekly wage was found among nonprofit *Colleges, universities, and professional schools*. The average weekly wage for these nonprofits was \$999.79. This surpassed the average wage for all workers in privately owned *Colleges, universities, and professional schools* by almost \$30.

The interesting aspect for the wages of this group is that they are so much higher than the state average, yet nonprofits employ almost 94 percent of private workers in this industry. The only other educational nonprofit industry (with over 500 workers) was *Elementary and secondary schools*. Over 3,350 workers were included in this nonprofit group during first quarter 2008. The average weekly wage among these nonprofits was \$743.58 compared to the private state average of \$704.39 in *Elementary and secondary schools*. Again, four of every five workers in this industry group are nonprofit workers, so it is noticeable that the average weekly wage for nonprofits is almost \$40 higher than the state average for the industry.

Nonprofit *General medical and surgical hospitals* had the largest employment count with more than 23,600 during first quarter 2008. Workers in these nonprofits had an average weekly wage about three dollars less than the state average of \$927.81 for all *General medical and surgical hospitals*. Almost 94 percent of private employment in this industry is in a nonprofit. Unlike nonprofits in *Education*, nonprofits in this industry group have a significant influence on the state average wage for the industry.

There was no significant relationship between the average weekly wage of the remaining nonprofits in

The average weekly wage for nonprofits in six of the nine industry sectors surpass the average for all private workers in the state



health care industries (with over 500 workers) and the average weekly wage of those same industries when including all private employers. Nonprofits in four industry groups; *Home health care services*, *Residential mental health and substance abuse facilities*, *Continuing care retirement communities*, and *Other residential care facilities*, surpassed the state average weekly wage. The remaining nonprofit health care industry groups, *Nursing care facilities*, and *Specialty (except psychiatric and substance abuse) hospitals*, fell short of state averages.

Among nonprofit *Social assistance* firms with more than 500 workers, only workers in *Services for the elderly and persons with disabilities* and *Other individual and family services* received a lower average weekly wage, \$310.77 and \$461.64, than the state averages of \$350.06 and \$510.24.

Industry Sectors

Private nonprofit firms in the state operate in all but the *Mining* and *Utilities* industry sectors. The firms

with the highest numbers of employees conducted business in the *Educational services* and the *Health care and social assistance* industry sectors. Firms in *Other services* came in at a distant third with over 2,000 employees during first quarter 2008.

New Hampshire's *Other services* sector included nonprofit firms that conduct business as:

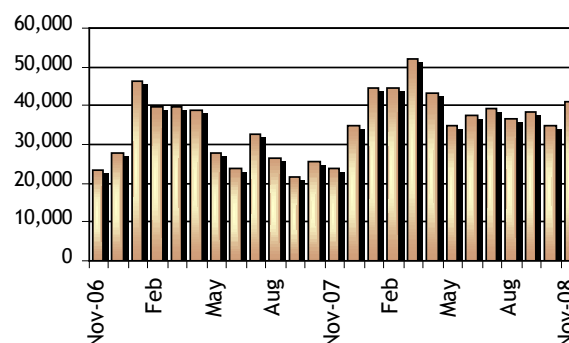
- ◇ Religious organizations
- ◇ Voluntary health organizations
- ◇ Grantmaking and giving services
- ◇ Human rights organizations
- ◇ Environment, conservation and wildlife organizations
- ◇ Other social advocacy organizations
- ◇ Civic and social organizations
- ◇ Business and professional associations
- ◇ Labor unions and similar labor organizations
- ◇ Pet care (except veterinary) services

Anita Josten

Unemployment Compensation Claims Activity

Claims Activity

Total Regular Unemployment Compensation Programs:				Change from Previous			
	Nov-08	Oct-08	Nov-07	Month		Year	
				Net	Percent	Net	Percent
Initial Claims	7,178	5,680	4,255	1,498	26.4%	2,923	68.7%
Continued Weeks	41,032	34,858	23,684	6,174	17.7%	17,348	73.2%



Continued Weeks Claimed

November 06 to November 08

Unemployment Compensation Fund

Trust Fund

Unemployment compensation fund balance at the end of November	\$188,374,727.53
Average payment for a week of total unemployment:	\$276.08
Net benefits paid:	\$7,685,706.44
Net contributions received during the month:	\$2,017,300.82
Interest Received:	\$0.00
Reed Act Distribution:	\$0.00
Reed Act Withdrawn for Administrative Costs:	\$0.00

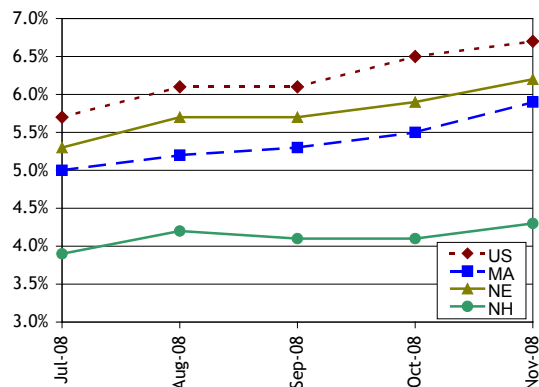
			Change from Previous	
Nov-08	Oct-08	Nov-07	Month	Year
212.425	216.573	210.177	-1.9%	1.1%

United States
All Urban Areas (CPI-U)
(1982-1984=100)

Consumer Price Index

Seasonally Adjusted Estimates

Unemployment Rates by Region



Seasonally Adjusted	Nov-08	Oct-08	Nov-07
United States	6.7%	6.5%	4.7%
Northeast	6.1%	5.8%	4.4%
New England	6.2%	5.9%	4.5%
Connecticut	6.6%	6.5%	4.9%
Maine	6.3%	5.7%	4.9%
Massachusetts	5.9%	5.5%	4.3%
New Hampshire	4.3%	4.1%	3.4%
Rhode Island	9.3%	9.3%	5.2%
Vermont	5.7%	5.2%	3.8%
Mid Atlantic	6.1%	5.8%	4.4%
New Jersey	6.1%	6.0%	4.2%
New York	6.1%	5.7%	4.6%
Pennsylvania	6.1%	5.8%	4.4%

Jul-08 Aug-08 Sep-08 Oct-08 Nov-08

Local Area Unemployment Statistics (LAUS) By Place of Residence

New Hampshire					
Unemployment Rate	3.9%	4.2%	4.1%	4.1%	4.3%
Civilian Labor Force	743,210	744,000	746,300	744,430	743,040
Number Employed	714,250	712,910	715,370	713,910	711,300
Number Unemployed	28,960	31,090	30,930	30,520	31,740
United States (in thousands)					
Unemployment Rate	5.8%	6.2%	6.2%	6.6%	6.8%
Civilian Labor Force	154,506	154,823	154,621	154,878	154,620
Number Employed	145,596	145,273	145,029	144,657	144,144
Number Unemployed	8,910	9,550	9,592	10,221	10,476

Current Employment Statistics (CES) By Place of Establishment

Supersector Jul-08 Aug-08 Sep-08 Oct-08 Nov-08

Total Nonfarm	655,000	657,000	656,900	656,300	657,200
Construction	27,700	27,700	27,700	27,500	27,700
Manufacturing	77,500	77,800	76,900	76,600	76,800
Durable Goods	59,400	59,900	59,100	58,800	58,900
Non-Durable Goods	18,100	17,900	17,800	17,800	17,900
Trade, Transportation, and Utilities	144,200	143,800	143,100	143,300	143,000
Wholesale Trade	29,200	29,100	29,100	29,100	28,900
Retail Trade	99,400	99,000	98,200	98,400	98,200
Transportation and Utilities	15,600	15,700	15,800	15,800	15,900
Information	12,400	12,400	12,200	12,200	12,100
Financial Activities	39,100	39,100	39,000	39,000	38,700
Real Estate and Rental and Leasing	7,900	8,000	7,900	7,900	7,900
Professional and Business Services	68,600	68,600	68,300	68,300	68,800
Administrative and Support	30,100	30,300	30,200	30,100	30,300
Education and Health Services	105,800	106,000	106,300	107,300	107,400
Educational Services	23,800	23,800	24,000	24,500	24,600
Health Care and Social Assistance	82,000	82,200	82,300	82,800	82,800
Leisure and Hospitality	63,800	63,800	63,700	63,800	63,700
Arts, Entertainment, and Recreation	10,800	10,700	10,700	10,200	9,900
Accommodation and Food Services	53,000	53,100	53,000	53,600	53,800
Other Services	22,300	22,400	22,300	22,800	23,000
Government	92,400	94,200	96,200	94,400	94,900
Federal Government	7,500	7,500	7,500	7,400	7,400
State Government	24,400	23,900	24,800	23,600	23,300
Local Government	60,500	62,800	63,900	63,400	64,200

Current month is Preliminary
Past months are Revised

Please note that not all supersectors meet the statistical criteria for publication in this category. We seasonally adjust the total nonfarm data series and all the published supersectors independently. Therefore, the sum of the published parts will not equal the total.

Not Seasonally Adjusted Estimates

Labor Force Estimates

New Hampshire	Nov-08	Oct-08	Nov-07
Total Civilian Labor Force	741,060	741,570	739,750
Employed	710,980	713,760	716,480
Unemployed	30,080	27,810	23,270
Unemployment Rate	4.1%	3.8%	3.1%

United States (# in thousands)	Nov-08	Oct-08	Nov-07
Total Civilian Labor Force	154,624	155,012	154,035
Employed	144,609	145,543	147,118
Unemployed	10,015	9,469	6,917
Unemployment Rate	6.5%	6.1%	4.5%

Unemployment Rates by Area

Counties	Nov-08	Oct-08	Nov-07
Belknap	4.4%	4.0%	3.3%
Carroll	4.1%	3.4%	3.2%
Cheshire	3.8%	3.6%	3.0%
Coos	5.7%	4.6%	4.2%
Grafton	3.4%	3.0%	2.8%
Hillsborough	4.1%	3.8%	3.1%
Merrimack	3.7%	3.6%	2.8%
Rockingham	4.4%	4.0%	3.5%
Strafford	3.7%	3.6%	2.8%
Sullivan	3.8%	3.5%	2.7%

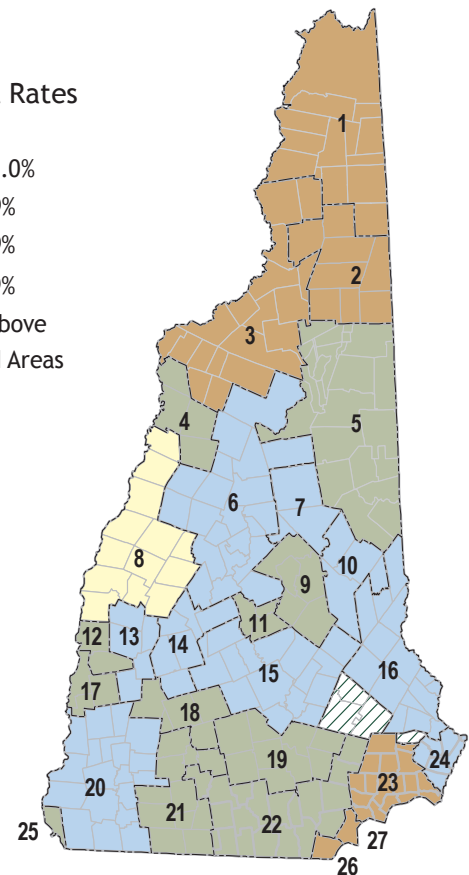
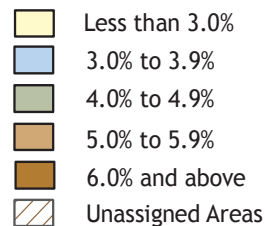
Map	Nov-08	Oct-08	Nov-07
Key Labor Market Areas			
1 Colebrook NH-VT LMA, NH Portion	5.3%	4.6%	5.1%
2 Berlin NH MicroNECTA	5.4%	4.3%	4.2%
3 Littleton NH-VT LMA, NH Portion	5.3%	4.0%	3.4%
4 Haverhill NH LMA	4.3%	3.9%	4.1%
5 Conway NH-ME LMA, NH Portion	4.2%	3.4%	3.3%
6 Plymouth NH LMA	3.9%	3.4%	3.1%
7 Moultonborough NH LMA	3.3%	2.9%	3.0%
8 Lebanon NH-VT MicroNECTA, NH Portion	2.6%	2.6%	2.1%
9 Laconia NH MicroNECTA	4.6%	4.1%	3.4%
10 Wolfeboro NH LMA	3.9%	3.6%	3.0%
11 Franklin NH MicroNECTA	4.8%	4.5%	3.0%
12 Claremont NH MicroNECTA	4.2%	3.9%	2.8%
13 Newport NH LMA	3.8%	3.6%	3.0%
14 New London NH LMA	3.3%	3.2%	2.6%
15 Concord NH MicroNECTA	3.7%	3.5%	2.9%
16 Rochester-Dover NH-ME MetroNECTA, NH Portion	3.8%	3.6%	2.9%
17 Charlestown NH LMA	4.7%	3.8%	2.8%
18 Hillsborough NH LMA	4.1%	4.1%	3.3%
19 Manchester NH MetroNECTA	4.0%	3.8%	3.1%
20 Keene NH MicroNECTA	3.5%	3.3%	2.8%
21 Peterborough NH LMA	4.3%	4.2%	3.4%
22 Nashua NH-MA NECTA Division, NH Portion	4.0%	3.8%	3.1%
23 Exeter Area, NH Portion, Haverhill-N. Andover-Amesbury MA-NH NECTA Division	5.1%	4.4%	3.9%
24 Portsmouth NH-ME MetroNECTA, NH Portion	3.8%	3.5%	3.0%
25 Hinsdale Town, NH Portion, Brattleboro VT-NH LMA	4.8%	4.8%	3.6%
26 Pelham Town, NH Portion, Lowell-Billerica-Chelmsford MA-NH NECTA Division	5.8%	4.8%	4.5%
27 Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA Division	5.6%	5.0%	4.9%

Unemployment Rates by States

Not Seasonally Adjusted	Nov-08	Oct-08	Nov-07
U.S and Regional States			
United States	6.5%	6.1%	4.5%
Northeast	5.9%	5.5%	4.2%
New England	5.9%	5.4%	4.1%
Connecticut	6.4%	6.1%	4.6%
Maine	6.2%	5.2%	4.7%
Massachusetts	5.5%	5.0%	3.8%
New Hampshire	4.1%	3.8%	3.1%
Rhode Island	8.5%	8.8%	4.7%
Vermont	5.5%	4.6%	3.5%
Mid Atlantic	5.9%	5.5%	4.2%
New Jersey	5.8%	5.6%	3.9%
New York	5.9%	5.4%	4.4%
Pennsylvania	5.9%	5.4%	4.1%

Current month is Preliminary
Past months are Revised

November - 08 Unemployment Rates



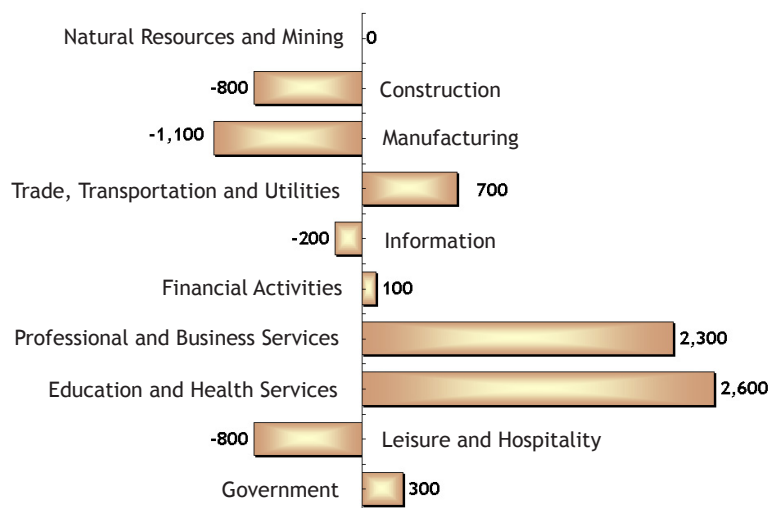
New Hampshire unemployment and labor force estimates are calculated using a regression model which depends on Current Population Survey (CPS) estimates. Labor Market Area estimates are calculated using the Bureau of Labor Statistics "Handbook Method" and then adjusted to the State levels.

Monthly Not Seasonally Adjusted New Hampshire Nonfarm Wage and Salary Employment

Current Employment Statistics Employment by Supersector by place of establishment	Number of Jobs			Change from previous:	
	Nov-08	Oct-08	Nov-07	Month	Year
	preliminary	revised			
Total All Supersectors	660,600	661,300	656,700	-700	3,900
Private Employment Total	562,200	563,200	558,600	-1,000	3,600
Natural Resources and Mining	1,100	1,100	1,100	0	0
Construction	28,300	28,800	29,100	-500	-800
Manufacturing	77,100	76,900	78,200	200	-1,100
Durable Goods	59,100	59,000	59,900	100	-800
Non-Durable Goods	18,000	17,900	18,300	100	-300
Trade, Transportation and Utilities	146,100	143,900	145,400	2,200	700
Wholesale Trade	28,900	29,200	28,400	-300	500
Retail Trade	101,300	98,700	101,300	2,600	0
Transportation and Utilities	15,900	16,000	15,700	-100	200
Information	12,200	12,100	12,400	100	-200
Financial Activities	38,600	38,800	38,500	-200	100
Professional and Business	68,900	68,800	66,600	100	2,300
Education and Health	107,800	107,200	105,200	600	2,600
Leisure and Hospitality	59,300	62,900	60,100	-3,600	-800
Other Services	22,800	22,700	22,000	100	800
Government Total	98,400	98,100	98,100	300	300

Change in Nonfarm Employment

Nov. 07 - Nov. 08



Monthly Analysis of Current Employment Statistics (CES) Data

For further analysis please read the *Detailed Monthly Analysis of Industry Employment Data* on our Web site at www.nh.gov/nhes/elmi/nonfarm.htm

Seasonally Adjusted:

Preliminary seasonally adjusted nonfarm employment for November 2008 increased over-the-month, up 900 jobs. From November 2007 to November 2008 employers added 3,900 jobs.

Professional and business services (supersector 60) and government (supersector 90) each gained 500 jobs over-the-month. From October to November employment in construction (supersector 20), manufacturing (supersector 30), and other services (supersector 80) each added 200 jobs to their payroll.

Education and health services (supersector 65) grew slightly, with an increase of 100 jobs.

Employment in trade, transportation, and utilities (supersector 40) and financial activities (supersector 55) each lost 300 jobs, over-the-month. Information (supersector 50) and leisure and hospitality (supersector 70) each posted a slight loss of 100 jobs.

Seasonally Unadjusted:

Preliminary not seasonally adjusted employment decreased over-the-month, down 700 jobs. From

Monthly Unadjusted Nonfarm Wage and Salary Employment by Metropolitan Statistical Areas

Employment by Sector number of jobs by place of establishment	Manchester NH MetroNECTA			Nashua NH-MA NECTA Division, NH Portion			Portsmouth NH-ME MetroNECTA, NH Portion			Rochester-Dover NH-ME MetroNECTA, NH Portion		
	preliminary Nov-08	Change from previous:		preliminary Nov-08	Change from previous:		preliminary Nov-08	Change from previous:		preliminary Nov-08	Change from previous:	
		Month	Year		Month	Year		Month	Year		Month	Year
Total All Sectors	102,200	500	-300	135,900	500	800	57,000	-200	700	59,200	500	800
Private Employment Total	90,400	200	-300	120,400	400	500	46,900	-200	200	45,000	300	500
Natural Resources and Construction	4,800	-100	-200	5,100	0	-300	1,600	0	0	2,000	0	0
Manufacturing	9,700	100	100	25,200	-100	-200	3,900	0	0	7,100	100	200
Trade, Transportation and Utilities	20,500	100	-700	30,800	300	-400	11,400	200	0	11,400	200	-100
Wholesale Trade	4,800	0	100	6,300	-100	100	2,000	0	0	1,200	0	0
Retail Trade	12,800	400	-400	20,400	400	-500	8,200	200	0	9,100	200	-200
Transportation, Warehousing and Utilities	Data not available			4,100	0	0	1,200	0	0	1,100	0	100
Information	3,400	100	100	2,200	0	0	1,900	0	0	1,100	0	0
Financial Activities	8,300	-100	-200	9,200	100	400	4,900	0	0	3,000	0	0
Professional and Business	13,200	0	0	15,500	300	600	9,200	0	0	4,900	0	200
Education and Health	17,300	0	300	17,500	0	400	5,800	0	100	8,200	0	100
Leisure and Hospitality	8,500	0	100	10,500	-200	0	6,800	-400	100	5,500	0	100
Other Services	4,700	100	200	4,400	0	0	1,400	0	0	1,800	0	0
Government Total	11,800	300	0	15,500	100	300	10,100	0	500	14,200	200	300

Average Earnings and Hours of Production Workers in Manufacturing

Sector	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Nov-08 preliminary	Oct-08 revised	Nov-07	Nov-08 preliminary	Oct-08 revised	Nov-07	Nov-08 preliminary	Oct-08 revised	Nov-07
New Hampshire									
All Manufacturing	\$669.32	\$662.97	\$695.97	38.6	38.3	40.7	\$17.34	\$17.31	\$17.10
Durable Goods	\$685.60	\$674.46	\$729.28	38.8	38.3	42.4	\$17.67	\$17.61	\$17.20
Nondurable Goods	\$619.40	\$628.12	\$593.56	38.0	38.3	35.5	\$16.30	\$16.40	\$16.72

November 2007 to November 2008, employers posted an increase of 3,900 jobs.

With a seasonal slowdown, leisure and hospitality (supersector 70) lost 3,600 jobs. Employers in construction (supersector 20), also affected somewhat by seasonal changes, reduced employment by 500 jobs over-the-month. Financial activities (supersector 55) experienced a drop of 200 jobs from October to November.

in education and health services (supersector 65) expanded their workforce, adding 600 jobs from October to November. Employment in government (supersector 90) increased over-the-month, adding 300 jobs. Manufacturing (supersector 30) posted a gain of 200 jobs from October to November. Employment in information (supersector 50), professional and business services (supersector 60), and other services (supersector 80) each grew by 100 jobs.

Gail Clay

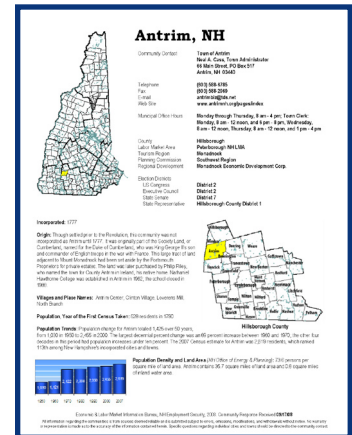
Trade, transportation, and utilities (supersector 40) saw an increase of 2,200 jobs over-the-month. Employers

New on the Web

New Hampshire Community Profiles is your one-stop location for information on the Granite State's cities and towns

Do you know the population of the town you live in? Ever wonder who the largest employer in your town is? Do you know how many residents in your town have at least a bachelor's degree? Do you know your town's annual budget?

An easy way to find the answers to these questions and more is to access the 2008 update of *New Hampshire Community Profiles* now available online at: www.nh.gov/nhes/elmi/communpro.htm



Join the thousands of people who have already used this online publication to find the huge amount of data compiled on New Hampshire's 234 incorporated cities and towns in the state.

Much of the data was supplied by local municipal offices, without whose assistance this online publication would not be possible. Other sources of the data include the US Census Bureau, NH Office of Energy and Planning, NH Department of Education, NH Department of Revenue Administration, and New Hampshire Employment Security's Economic and Labor Market Information Bureau.



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